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# The Agricultural Situation in Eastern Europe

Review of 1974 and Outlook for 1975



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THE AGRICULTURAL SITUATION IN EASTERN EUROPE, REVIEW OF 1974 AND OUTLOOK FOR 1975. East European Area, Foreign Demand and Competition Division, Economic Research Service. Foreign Agricultural Economic Report No. 102.

**ABSTRACT:** In 1974, agricultural production increased in all countries of Eastern Europe except Bulgaria and Romania. The grain crop reached a record for the third consecutive year and the output of livestock products increased. Unfavorable weather, however, reduced the harvest of sunflowerseed, vegetables, fruit, and tobacco; caused significant post-harvest losses of grain, potatoes, and forage crops; and lowered the sugar content of sugarbeets. U.S. agricultural exports to the region are forecast to level off in 1974/75.

**KEYWORDS:** Eastern Europe, weather, crops, livestock, agricultural policy, agricultural trade.

## **FOREWORD**

This report summarizes current agricultural, trade, and policy developments in Eastern Europe, with emphasis on items of greatest interest to the United States.

Authors are named at the end of each section. Carolyn Miller developed the appendix tables. The comments of reviewers in the Economic Research Service and the Foreign Agricultural Service and reports from U.S. Agricultural Attachés stationed in Belgrade, Vienna, and Warsaw are acknowledged with appreciation.

Other regional reports have been published for Western Europe and the USSR. Reports are being prepared for the Western Hemisphere, the Far East, Africa and West Asia, and the People's Republic of China.

Donald Chrisler, Program Leader  
East European Area  
Foreign Demand and Competition Division

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# THE AGRICULTURAL SITUATION IN EASTERN EUROPE:

## Review of 1974 and Outlook for 1975

### SUMMARY

In 1974, gross agricultural output increased 8 percent in East Germany, 4 percent in Hungary, 3 percent in Czechoslovakia and Yugoslavia, and 2 percent in Poland. Production, especially of crops, declined in Bulgaria and Romania. For Hungary, most of the increase in agricultural output was in livestock products and, for Poland, all of the gain came from that sector.

Unusual weather patterns—winter and spring drought followed by heavy rains and flooding in summer and fall—plagued most of the area. Fruit and vegetable production suffered the greatest damage, while oilseed losses were less serious. Fall seeding and plowing were significantly delayed, and spring fieldwork is heavier than normal.

Despite weather difficulties, bumper wheat and barley crops pushed total grain output above the record levels of 1972 and 1973. Grain was harvested with a very high moisture content, however, and post-harvest losses were large. Production was down for the second successive year in Bulgaria and Romania, but grain crops in Czechoslovakia, East Germany, Poland, and Yugoslavia each exceeded previous records by a million tons. Regional grain import requirements will be up, however, because of mediocre potato and silage harvests. Furthermore, livestock were kept on feed longer than usual in the spring of 1974, and post-harvest losses of root crops and hay were high.

Winterkill reduced the acreage seeded to rape, but good yields in East Germany and Poland kept regional production from falling below the 1973 output. Drought cut sunflower yields in Bulgaria and Romania, and very wet harvest conditions reduced the crops in Hungary and Yugoslavia. Exports of sunflowerseed and oil from the region will be down this year and imports of oilmeal will again be large.

The sugarbeet crop was equal to the 1972 record but, because of low sugar content, sugar production will not increase in 1974/75. A shortage of sugar has forced Poland to curtail exports. Tobacco output fell 10 percent in Bulgaria and 17 percent in Yugoslavia.

Potato production was down 6 percent in Poland, the major producer, but good crops were lifted in East

Germany and Romania. There were shortages of other vegetables and of most fruit throughout the region, therefore exports of most fruit and vegetables and their products will fall.

Foreign exchange earnings from livestock products, especially beef, were down in 1974. Yugoslavia, for example, estimates that the European Community ban on imports of beef and cattle cost them \$100 million in lost sales. Yugoslavia and other regional beef exporters are turning to the USSR, Middle East, and North Africa, but thus far those markets have not been able to absorb all of the East European surplus. Exporters are beginning to shift to exports of mutton and lamb to meet consumer preferences in the Middle East and North Africa.

Meat production and subsidized consumption continued to rise in 1974. In the 4 years since the December 1970 strikes, per capita meat consumption in Poland increased 25 percent. Despite this sharp increase, retail meat supplies at heavily subsidized prices have not kept pace with the rise in disposable incomes and a shortage of meat developed in early 1975. To cover the domestic shortage, Poland has reduced meat exports.

Because the region's import prices have gone up more than export prices, world inflation has left its mark on the rigidly controlled price economies of East European CEMA\* members. Consumer prices of basic foods continue to be subsidized but prices of selected consumer goods and gasoline have increased and income and land taxes have been raised. Prices for products traded among CEMA members, normally fixed for a 5-year period, were raised in January 1975 and will now be renegotiated annually. This price realignment favors the raw material exporters—the USSR, Poland, and Romania. East European fertilizer use and agricultural mechanization, until now not affected by high world petroleum prices, will feel the burden.

\*Council for Economic Mutual Assistance. Includes Bulgaria, Cuba, Czechoslovakia, East Germany, Hungary, Mongolia, Poland, Romania, and the USSR.

In terms of volume and value, U.S. exports of farm products to Eastern Europe will level off in 1974/75. The volume of feed grain, cattle hides, and vegetable oil is forecast to increase but wheat exports will decline sharply. Little change is expected in the volume of oilmeal exports. Beyond this year, the outlook is cloudy.

Eastern Europe will be using more of its foreign exchange for fuel imports and may be earning less from meat exports. On the other hand, East European government commitments to increase domestic meat consumption, if continued, mean a strong market for feed grain and oilmeal.

## UNUSUAL WEATHER PATTERN

All countries of Eastern Europe experienced weather extremes during the 1973/74 growing season. Bulgaria, beset by drought from October 1973 through November 1974, suffered the most extensive crop damage. Damage would have been even more extensive except that about 25 percent of Bulgaria's arable land is under irrigation. Weather had the least effect on crops in East Germany.

Winter drought extended into April 1974, permitting planting of spring grains far ahead of schedule but retarding the growth of pastures. Rape suffered from winterkill, drought, and spring freezes. Spring freezes also injured orchards and vineyards. Crucial rains in late April revived the winter wheat crops in all countries except Bulgaria and Romania.

Overabundant rainfall from May through July caused some flood damage and lodging, and delayed the harvest of winter grains. The cool rainy weather also delayed the planting of corn for silage, retarded development of spring crops, and encouraged heavy weed growth.

All countries in the region except Romania and Bulgaria reported heavy rains and flooding during October, causing problems with the harvest of late crops and serious delays in seeding winter grains. October precipitation ranged from 5 to 7 inches in Poland, Slovakia, Hungary, and Yugoslavia, and soil moisture in these countries was 240, 160, 220, and 210 percent of normal, respectively, as of October 31. In sharp contrast, soil moisture was only 40 percent of normal in Bulgaria.

In Yugoslavia, about 300,000 hectares of agricultural land were affected by the October floods. On October 24, the Sava River in north-central Yugoslavia crested at 32 feet, a 100-year record. In northern and eastern Hungary, rivers crested at over 20 feet and at least 75,000 hectares of agricultural land were under water. Crests of 15 feet were reached in central Slovakia, flooding about 50,000 hectares of farmland.

Excessive rain reduced potato yields in Poland and Czechoslovakia, corn yield and quality in Yugoslavia, and vegetable yields in all of the flooded countries. Post-harvest losses of root crops and hay were larger than normal. Furthermore, additional fertilizer will be required to restore fertility to flooded areas.

Persistent rain, reinforced by a December thaw in the Austrian and Czechoslovakian mountains, caused flooding on all rivers of central Europe. In the four northern countries of Eastern Europe, flood alerts continued through January 1975. Winter temperatures have been above normal in these countries and there was very little snow in the lower elevations. Bulgaria's drought broke in December and a good snow cover developed in the western half of that country.

Precipitation during February-March 1975 was light, ranging from 1 to 2 inches, and temperatures were well above normal. Nevertheless, soil moisture reserves are much higher than they were a year ago. (Donald Chrisler)

## THIRD CONSECUTIVE BUMPER GRAIN HARVEST

In 1974, there was no significant change in the total grain acreage in Eastern Europe or in the grain acreage of any single country. The trend toward replacing rye and oats with wheat and barley continued.

Because of bumper wheat and barley crops, the 1974 grain harvest exceeded the records of the previous 2 years (table 7). In Czechoslovakia, East Germany, Poland, and Yugoslavia, the 1974 grain crops exceeded previous records by from 1 to 1.4 million tons.<sup>1</sup> The harvest in Hungary was a record, but grain production in Bulgaria and Romania was down for the second

successive year. In all countries except Bulgaria and Romania, very high moisture content and limited drying and storage facilities resulted in higher than normal post-harvest losses.

Net grain imports in 1974/75 are forecast to recover somewhat from the depressed level of 1973/74 (table 1). The drop in 1973/74 was caused by the change in Hungary's status from a net importer to a sizable net exporter. The recovery this year is primarily the result of Bulgaria's shift in the other direction. Bulgaria, normally a net exporter, has already received 300,000 tons of grain from the USSR, lesser quantities from other East European countries, and 65,000 tons from the United States.

<sup>1</sup> Tonnage figures are metric.

Table 1--Eastern Europe: Grain trade, 1970/71-1974/75 1/

Trade	Bulgaria	Czechoslovakia	East Germany	Hungary	Poland	Romania	Yugoslavia	Total
Million tons								
Imports								
Exports								
1970/71	0.3	2.2	2.3	0.4	2.8	1.1	1.1	10.3
1971/72	.1	2.3	2.7	.6	3.7	.4	.4	10.2
1972/73	.1	1.4	3.5	1.2	2.5	.3	.7	9.9
1973/74	--	1.3	2.5	.2	3.3	.6	.8	8.7
1974/75 2/	.9	1.0	2.0	.3	3.5	1.1	.5	9.3
1975/76	..	..	..	..	..	..	..	..
Net imports								
1970/71	.5	.1	.4	.6	.2	.3	.1	2.4
1971/72	.5	--	.3	.2	.1	.2	--	1.3
1972/73	.7	.1	.3	.1	.2	.9	.1	2.4
1973/74	.2	--	.2	.4	.5	.2	.6	4.1
1974/75 2/	--	--	.1	2.0	.3	.2	.1	2.7
1975/76	..	..	..	..	..	..	..	..

-- = zero or less than 50,000 tons.

1/ Year beginning July 1. Excluding rice. Entries may not add to totals because of rounding.

2/ Forecast.

3/ Minus denotes net exports.

Source: Foreign Agricultural Service and Economic Research Service.

Romania's imports will be the largest since the flood year of 1970/71. The United States will be the main supplier.

In Poland, a decline in potato production (in grain equivalent<sup>2</sup>) almost offset the increase in grain output, the feed value of hay and silage was down 30 percent, and less beet pulp was available for feed. That country's gross grain import requirements are above the 1973/74 level. The excellent grain and potato crops in East Germany and the bumper grain crop in Czechoslovakia should lower grain import requirements in those countries. The USSR will be the main supplier to those countries, with the United States a close second.

For the second year in a row, Hungary will be by far the largest exporter of grain in the region. Yugoslavia has elected to put its current 300,000-ton wheat surplus in stocks rather than in exports.

The condition of winter grain is good in Romania and fair in Bulgaria. There were serious delays in fall seeding in all other countries. In Yugoslavia and Poland, the

winter grain area was down 14 and 7 percent, respectively. Yugoslavia, with a good supply of wheat from the 1974 harvest, plans to make up the winter wheat shortfall by planting more corn in the spring of 1975. For Poland, too far north to grow corn for grain, the shortfall will have to be compensated for by increased seeding of lower yielding spring wheat, barley, and oats. In early March, the condition of winter grain in Poland was rated between average and good. Although Czechoslovakia, East Germany, and Hungary completed their plans for fall seeding, progress was 3 to 4 weeks behind schedule resulting in spotty germination and weak rooting. The condition of wheat in East Germany has been reported as highly susceptible to winterkill. In Hungary, the mild winter aided the recovery of winter wheat and a normal crop is expected.

In the four northern countries, fall plowing was far behind schedule because of late harvests and waterlogged fields. Although mild dry weather in late January and February permitted some resumption of plowing in Hungary and on the sandier soils in East Germany and Poland, spring fieldwork is abnormally heavy. (Donald Chrisler)

<sup>2</sup> Assuming 4 tons of potatoes equivalent to 1 ton of grain.

## OILSEED PRODUCTION DOWN

Winterkill reduced *rapeseed* acreage in the northern countries, with most of the reduction in Poland. High yields in Poland and East Germany, however, saved regional production from falling below the 1973 level. The crop was down in Czechoslovakia (tables 6 and 7).

The 1974 *sunflowerseed* acreage increased, primarily in Romania, but regional production was down almost 20 percent because of drought in Romania and Bulgaria and severe flooding at harvest in Hungary and Yugoslavia. Production fell in all countries, but Yugoslavia and Romania accounted for most of the decline.

Some rise in *soybean* area occurred in 1974, but Romania continues to be the only country with any sizable acreage. The 1974 regional acreage level is estimated at 240,000 hectares, about 12 percent above 1973. Production in the region rose 11 percent to an estimated 305,000 tons, of which Romania produced about 250,000 tons.

Decreased oilseed production can be expected to diminish 1975 exports of edible vegetable oil from the region. For Romania, the major sunflower oil exporter, exports may drop less than expected because of the increased availability of soybean oil for domestic consumption. Bulgaria banned the export of sunflowerseeds for crushing in July 1974. For Yugoslavia, although consumption of vegetable oil will be restrained by high retail oil prices, the sharp decline in oilseed production will require increased vegetable oil imports in 1975. Hungarian oil supplies will

depend on the percentage of high oil content sunflowerseed produced, the purchase price of which increased 11 percent in May 1974 while prices for other types remained static.

As shown in table 2, Eastern Europe's imports of *oilseed meal* increased 60 percent during 1971-72. In that 2-year period, imports of Brazilian soybean meal and West European meal processed from U.S. and Brazilian soybeans gained substantially but imports of U.S. soybean meal declined somewhat. In 1973, regional imports of oilseed meal declined slightly but imports of U.S. soybean meal increased 80 percent.

Data are not sufficient to permit an estimate of total oilseed meal imports in 1974. U.S. direct shipments and inter-German trade were down in 1974 (data on transshipments are not available). The regional drop in oilseed output in 1974 is expected to hold East European meal imports at a high level in 1975.

There are several discrepancies between U.S. data on direct exports and East European country data on imports of U.S. oilseed meal. For 1970-72, the last two lines of table 3 show a fairly close correlation, however, indicating that country-to-country differences for those years may be accounted for by transshipments within Eastern Europe or by shipping lags. For 1973, most of the discrepancy may be attributed to transshipments from outside the region, especially transshipments of U.S. meal through West Germany to Czechoslovakia. In 1971-74, Hungarian imports were 370,000 tons greater than U.S. exports. Most of this discrepancy may be

Table 2--Eastern Europe: Imports of oil meal, 1970-74 1/

Type and origin	1970	1971	1972	1973	1974
:	:	:	:	:	:
Soybean meal:					
Direct U.S. shipments 2/ ...:	553	444	469	913	788
Transshipments 3/ .....:	116	98	90	(100)	
Total U.S. .......	669	542	559	1,013	
:					
Inter-German 4/ 5/ .....:	389	478	610	374	237
Other West German 4/ 6/ ....:	110	151	241	381	
Other West European 4/ 7/ ..:	12	33	248	147	
Brazilian 8/ .....:		85	452	223	
Total soybean meal .....:	1,180	1,289	2,110	2,138	
:					
Indian oilseed meal 9/ .....:	491	615	561	367	
:					
Other oilseed meal 10/ .....:	47	84	(85)	(150)	
:					
Total oilseed meal .....:	1,718	1,988	2,756	2,655	
:					
Fishmeal:					
Peruvian 11/ .....:	423	524	264	107	
Other .....:	146	94	225	221	
Total fishmeal 12/ .....:	569	618	489	328	
:					

Blank spaces indicate data not available. ( ) = estimates.

1/ East European data except as noted.

2/ U.S. export data.

3/ Through Hamburg.

4/ Processed from U.S. and Brazilian soybeans.

5/ West German exports to East Germany. Oil World, various issues.

6/ West German exports to East European countries other than East Germany.

West German data.

7/ Netherlands, Denmark, and Switzerland.

8/ Oil World data supplementing East European data.

9/ Primarily peanut meal with some cottonseed and lesser amounts of linseed and other meals. Oil World data for Bulgaria and Romania.

10/ Turkish sunflowerseed meal to Bulgaria and Hungary, Syrian meals to East Germany, Iranian meals to Czechoslovakia, and minor amounts of Argentinian, Greek, and Egyptian meals. Oil World data supplementing East European data. Also U.S. data on linseed meal exports to Poland.

11/ Oil World, August 16, 1974. Aggregate data for 1970-73 period are corroborated by Digest of 1968-73 World Statistics (International Association of Fishmeal Manufacturers), although year-to-year figures do not match.

12/ FAO Yearbook of Fishery Statistics, 1973.

Table 3--Direct U.S. oilseed meal exports 1/ to Eastern Europe  
and East European imports of U.S. oilseed meal, 1970-74

Country	1970	1971	1972	1973	1974
<u>1,000 tons</u>					
Bulgaria					
U.S. exports .....					
U.S. exports .....	56	10	0	0	16
Bulgarian imports .....	NA	NA	NA	NA	<u>2/18</u>
Czechoslovakia					
U.S. exports .....					
U.S. exports .....	44	79	125	145	80
Czechoslovakian imports ..:	44	64	159	337	NA
East Germany					
U.S. exports .....					
U.S. exports .....	5	0	0	33	0
East German imports .....	NA	NA	NA	NA	NA
Hungary					
U.S. exports .....					
U.S. exports .....	164	147	58	87	118
Hungarian imports .....	NA	203	116	189	<u>2/275</u>
Poland					
U.S. exports 3/ .....					
U.S. exports 3/ .....	102	91	110	361	269
Polish imports .....	94	73	91	397	NA
Romania					
U.S. exports .....					
U.S. exports .....	0	0	52	168	103
Romanian imports .....	NA	NA	NA	NA	<u>2/109</u>
Yugoslavia					
U.S. exports .....					
U.S. exports .....	185	117	135	168	221
Yugoslavian imports .....	158	105	108	52	139
All U.S. exports .....					
All U.S. exports .....	556	444	480	962	807
U.S. exports 4/ .....					
U.S. exports 4/ .....	331	434	428	761	NA
East European imports 4/ ...:					
East European imports 4/ ...:	296	445	474	975	NA

NA = not available.

1/ Soybean meal except as indicated.

2/ U.S. Embassy reports.

3/ Includes meals other than soybean meal (mostly linseed meal) amounting to 3,000 tons in 1970, 11,000 in 1972, 49,000 in 1973, and 19,000 in 1974.

4/ Bulgaria, East Germany, and Romania excluded in all years. Hungary excluded in 1970.

explained by transshipments through Yugoslavia. For that period, U.S. exports to Yugoslavia exceeded Yugoslav imports by 240,000 tons.

An oilseed acreage increase in the region is foreseen for 1975. The producer price for rapeseed increased 18 percent in Poland and 390,000 hectares were seeded last fall compared with 310,000 hectares<sup>3</sup> in the fall of 1973. Yugoslavia increased sunflowerseed producer

<sup>3</sup>Because of winterkill, only 260,000 hectares were harvested in the spring of 1974.

prices by 42 percent and anticipates a one-third increase in area. Plantings may fall short of that goal, however, because of lack of confidence in contracts caused by arrears in payments to producers in 1974. Yugoslavia also expects soybean acreage to double to about 20,000 hectares. Hungary plans to double soybean acreage to 28,000 hectares, and total oilseed area should grow from 190,000 hectares in 1974 to 225,000 hectares in 1975. In Bulgaria and Romania, the key factor will be the extent to which acreage brought under irrigation in 1974 is used for oilseed production. (Miles J. Lambert)

## OTHER CROPS

Acreage in *sugarbeets* was about the same as in 1973 but production was up about 10 percent. Increased output in Czechoslovakia and, to a lesser extent, in Yugoslavia, Hungary, and Romania accounted for most of the increment. The crop was down in Poland. Excess moisture lowered the sugar content of beets in most countries, and consequently, 1974/75 beet sugar output is expected to be at or below the 1973/74 level. In Poland, there is a shortage of sugar on the retail market and exports have been curtailed. The outlook for 1975 is for increased production in reaction to high world prices. Producer prices were raised in East Germany, Hungary, Poland, and Yugoslavia. Yugoslavia also increased retail sugar prices 22 percent in July 1974 and 67 percent in December 1974, with much of the increased receipts being used to develop refining capacity.

*Potato* acreage and production remained close to the 1973 level. A decline in output in Poland, which produces two-thirds of East European potatoes, was offset by increases in East Germany and Romania. Storage losses of potatoes in Poland were greater than normal.

*Fruit and vegetable* production proved most sensitive to weather conditions in 1974. In the north, frost, rain, and wind in the spring caused a 25-percent loss of tomatoes in East Germany and a two-thirds reduction in Government purchases of tomatoes in Poland. Over half the cucumber crop was lost in these countries. Shortages of most vegetables were reported in Poland and Czechoslovakia. Total output of vegetables in Poland fell 14 percent.

Although most vegetables were in adequate supply in Hungary, Government purchases were down 18 percent because of delayed plantings and early autumn frosts. Yugoslav production was at the 1973 level and Romanian output was up 3 percent. There was an average tomato harvest in Romania and a good crop in

Bulgaria—these are the largest exporters of fresh tomatoes in the region.

Fruit was in short supply in all northern countries. In Poland production was down 6 percent. Fruit deliveries in East Germany were below planned levels, with apple production 65 percent below fulfillment. East German reports stated that their fruit shortage could not be made up this year by imports from the southern countries. In Hungary, most fruits were hurt by spring rain and frost. The supply of apples was ample for normal export commitments but peach and pear exports were halted in July. In Yugoslavia, total fruit production fell 10 percent, with apples 17 percent and pears 15 percent below 1973 production. Plums, however, were slightly more abundant and increased prune production and exports are expected.

The southern countries reported sharp declines in grape production—34 percent in Romania; 20 percent in Hungary, and 23 percent in Yugoslavia. Weather extremes also reduced the quality of grapes, and wine exports from the region will decrease substantially in 1975.

*Tobacco* production in Bulgaria was down about 10 percent because of the severe drought. In the first 9 months of 1974, Bulgarian exports of Oriental tobacco amounted to 51,000 tons, at the level for that period in 1973. Export commitments to the Soviet Union for 1975 presently stand at 40,000 tons.

In Yugoslavia, tobacco production fell 17 percent to 54,000 tons, and insufficient funds delayed purchasing of the crop. Yugoslav exports in 1974, at 20,000 tons, were up 11 percent from 1973, with exports of Oriental leaf to the United States amounting to 7,500 tons, up 6 percent. In Yugoslavia and Bulgaria, significant shifts from Oriental to light, large-leaf varieties are continuing. In late 1974, Bulgaria purchased 120 large-leaf tobacco harvesters from Canada at a cost of \$1.6 million. (Miles J. Lambert)

## OUTPUT OF LIVESTOCK PRODUCTS UP AMID CLOUDED PROSPECTS

Compared with 1973, growth in livestock *inventories* was modest in 1974—the number of cattle and hogs increased 3 percent, horse numbers continued to decline, and growth in poultry flocks stopped (table 8). A further slowdown in the growth of inventories and production is anticipated in 1975 because of slack world demand for livestock products and higher costs of imported feed.

Regional meat production is estimated to have increased about 8 percent in 1974, with pork accounting for most of the increment (table 9). Pork accounts for about 60 percent of the total meat produced. Poland is the leading producer of pork and beef; Hungary, of poultry meat; and Bulgaria, of lamb.

During the past 4 years, meat consumption increased considerably because of subsidized stable prices (except in Romania and Yugoslavia) and increasing disposable income. Consumption exceeded planned levels in Czechoslovakia, Hungary, and Poland. Per capita meat consumption of 78 and 74 kilograms in Czechoslovakia and East Germany, respectively, was the highest in Eastern Europe in 1974. Consumption of about 45 and 35 kilograms in Romania and Yugoslavia, respectively, was the lowest. Growth of meat consumption in Romania and Yugoslavia has been dampened by retail price increases. In Poland, since the leadership change in 1970, meat consumption rose from 53 kilograms in 1970 to 66 kilograms in 1974, an annual rate of 5.5 percent. Despite this rapid increase, a meat shortage occurred in early 1975. This shortage developed because consumption has been heavily subsidized by holding retail meat prices stable for a number of years while disposable incomes have risen. Also, a feed shortage caused excessive slaughter in late 1974 and consequently, a reduction in slaughter animals by February 1975.

Pork dominates consumption as well as production. Per capita beef and veal consumption in the region ranges from 10 kilograms in Hungary to 24 kilograms in Czechoslovakia. The consumption of beef in proportion to other meats has not responded to increases in disposable income to the same degree that it has in most western industrial countries. Traditionally, pork is preferred in the region, partly because the quality of beef supplied to the domestic market is much below that which is exported or reserved for the tourist trade. Hungary, with a per capita consumption of 14 kilograms, is the regional leader in consumption of poultry meat.

Through a faster rate of increase in domestic meat production than in consumption, the net meat trade position improved in the region. Eastern Europe exported about 600,000 tons of meat and meat products annually during 1971-73, about half of it in unprocessed form (table 10). The leading products were Yugoslav beef and Polish ham. Poultry meat exports were

about 120,000 tons, with Hungary accounting for about half. In 1974, Hungary exported 88,000 tons of poultry meat.

The USSR has been the most important market for pork and poultry meat; Western Europe, Italy in particular, for beef and cattle; the United States, for canned ham; and the United Kingdom, for bacon. Bacon exports, of which Poland is the largest supplier, have had a declining trend in recent years.

A breakdown of beef and cattle exports follows:

Country	Beef		Cattle <sup>1</sup>	
	1972	1973	1972	1973
1,000 tons				
Bulgaria .....	7	NA	7	NA
Czechoslovakia .....	14	NA	2	NA
East Germany .....	NA	NA	27	NA
Hungary .....	17	23	64	68
Poland .....	18	33	( <sup>2</sup> )	1
Romania .....	25	36	28	NA
Yugoslavia .....	52	65	36	6

NA = not available. <sup>1</sup> Converted from live weight at a ratio of 1:0.57. <sup>2</sup> Less than 500 tons.

Until 1974, export potential for beef and slaughter cattle seemed inexhaustible. Steady increases in demand in western industrial countries encouraged production for export and, in 1973, Eastern Europe exported over half a billion dollars worth of beef and cattle. The bulk of these exports went to the European Community.

Beginning in February 1974, the EC imposed a series of restrictions on beef and cattle imports culminating in an outright ban in July. As a result of these measures, there was a buildup of frozen beef stocks in Eastern Europe, feeders had to carry slaughter cattle on maintenance rations, and exporters were forced to seek alternate markets. East European exporters had some success in shifting exports of high-quality beef and cattle to the USSR, North Africa, and the Middle East (partly in exchange for petroleum, cotton, and hard currency) but total beef and cattle exports from the region to all markets were down in 1974.

For example, in June 1974, Yugoslavia (the largest exporter of beef in Eastern Europe) sold 10,000 tons of beef to the USSR and was negotiating beef and cattle sales to Libya, the United Arab Republic, Kuwait, and Iran. Nevertheless, Yugoslavia's beef and cattle exports to all markets in 1974 fell to less than half of the 80,000-ton average (carcass weight) of 1972 and 1973. Yugoslav exporters estimate that the EC embargo cost them \$100 million in lost sales. Libya has contracted for 40,000 tons (carcass weight) of Yugoslav beef and cattle for 1975 delivery.

The USSR contracted to take 16,000 tons (carcass weight) of slaughter cattle from Hungary (the largest exporter of cattle in Eastern Europe) during the last

quarter of 1974. Despite this sale, Hungary's total 1974 cattle exports fell 25 percent below the 1972-73 average. The USSR contracted for an additional 22,500 tons (carcass weight) of Hungarian cattle for delivery in the first half of 1975.

Meat imports have declined since 1971 (table 10). Poland has been the principal meat importer, but Czechoslovakia is the only country whose average 1971-73 imports exceeded exports. The People's Republic of China is the leading meat supplier to the region, and there is also considerable intra-regional trade in livestock and meat.

Milk production is estimated to be up 2 to 3 percent in 1974 and egg production is up about 4 percent. Poland is the region's leading milk producer, both on a total and per capita basis, although a shortage of milk occurred in Poland during January-February 1975. Poland is the largest egg producer, while Hungary produces the most eggs per capita.

Following the Yugoslav initiative, Hungary embarked on an ambitious breeding-cattle import program in 1972. U.S. exports of breeding cattle to Hungary and other East European countries in the past 3 years were as follows:

Country	Dairy cattle			Beef cattle		
	1972	1973	1974	1972	1973	1974
<i>Head</i>						
Bulgaria .....	45	543	619	0	0	0
Czechoslovakia ..	32	0	0	0	0	0
Hungary .....	520	2,911	2,622	255	0	996
Poland .....	0	82	72	0	0	0
Yugoslavia .....	270	90	94	0	0	1,267

(Thomas A. Vankai)

## AGRICULTURAL POLICY CHANGES

Recent policy decisions affecting agriculture fall into three broad categories: (1) measures to minimize the effects of inflation, (2) measures to increase production and productivity, and (3) measures affecting the degree of socialization.

In 1974, the increase in aggregate import prices was greater than the increase in export prices for the region, making the battle against inflation extremely difficult. Nevertheless—through budgetary manipulations, equalization taxes, and price control—all governments except Yugoslavia maintained stable retail prices for bread, meat, sugar, and other basic foods and have promised to freeze the prices of these commodities through 1975. In July, Yugoslavia increased the retail price of bread 40 to 54 percent (depending on type of bread); sugar, 22 percent; and edible oil, 20 percent. In December, the price of sugar was raised 67 percent and edible oil, 32 percent.

The burden of increased retail price subsidies has been partially offset by raising land, income, and excise taxes, and by increasing the price of so-called nonessential goods, such as alcoholic beverages.

Until the end of 1974, the USSR, the principal energy supplier to Eastern Europe, did not increase energy prices to its CEMA partners. Prices of the remaining 5 to 15 percent of supply, imported from elsewhere, quadrupled. These price increases were transmitted to the consumers as doubled retail gasoline and diesel oil prices. Agriculture was shielded against the full impact of these price increases through exemptions or refunds. The governments also absorbed the increased cost of fertilizer and plant protection materials.

Although agriculture has been shielded from increased production costs, agricultural income will be reduced through taxation and, consequently, less

enterprise funds will be available for investment in 1975. In 1975 and subsequent years, the governments will have an additional burden of stabilizing agricultural production costs as technical improvements and stepped-up mechanization increase energy consumption.

The stable price agreement for trade among CEMA members, which was scheduled to continue to the end of 1975, was canceled effective January 1, 1975. Member nations agreed that they will deviate from their past practice of setting prices for 5-year periods. Instead, prices will be renegotiated annually based on average world prices prevailing in the past 5 years.

The new prices improved the terms of trade for the net raw material exporters—the USSR, Poland, and Romania. Oil prices doubled, prices of machinery and equipment increased 15 percent, and prices of agricultural products rose an average of 28 percent (including a 43-percent rise for beef). To Hungary, the poorest country in regard to natural resources, the Soviet Union granted credits to dampen the impact of the unfavorable export-import price ratio.

The agreement on annual trade price renegotiation foreshadows gradual further increases in energy prices until CEMA-produced oil reaches the cartel price level of the Organization of Petroleum Exporting Countries (OPEC). Gradual increases in production costs caused by higher energy prices will retard economic growth in Bulgaria, Czechoslovakia, East Germany, and Hungary. Yugoslavia, a non-CEMA member, has been hurt even more seriously with oil imports alone costing an additional \$600 million.

Government measures to raise production and productivity are geared toward increasing self-sufficiency in grain, protein feed, sugar, and livestock products; and toward shifting to value-added processed agricultural

exports. More high-yielding varieties of wheat are being used. Producer prices have been raised for sugarbeets in East Germany, Hungary, Poland, and Yugoslavia and for oilseeds in Czechoslovakia, East Germany, Hungary and Yugoslavia.

Bulgaria, concerned that increases in farm labor productivity have not been commensurate with the huge investment in mechanization, established the Agricultural Equipment Committee in mid-1974 to eliminate these shortcomings. This committee has complete charge of directing the course of mechanization including selection, production, and sale of machinery. Bulgaria also has ambitious plans to increase the irrigated land by 100,000 hectares annually. Irrigation is to be used principally for corn, alfalfa, and soybeans—crops that yield the highest return on investment.

In East Germany, supply and distribution of fertilizers, herbicides, and pesticides to agriculture are handled almost completely by an autonomous organization. By 1974, 300 agro-chemical centers were in operation. A trend in this direction is evident in Bulgaria and Czechoslovakia.

Hungary is expanding its Closed Production System (CPS).<sup>4</sup> In 1974, 448,000 hectares of corn, 29,000 hectares of sugarbeets, 17,000 hectares of alfalfa, 13,000 hectares of rice, and lesser areas of sunflower, soybeans, and potatoes were planted under CPS. The considerable hard currency investment in machinery is repayable in 3

<sup>4</sup> Uniform seed, machinery, and cultivation techniques applied on a large scale is the main characteristic of the system. A U.S. company introduced the system and is involved in providing technology and in selection of machinery, largely of U.S. and West German origin.

years from the surplus production generated by the system. The success of the system is demonstrated by the fact that some farms have repaid their debts within 2 years. In 1975, 900,000 hectares (about 16 percent of the arable land) will be included in the system, compared with 580,000 hectares in 1974.

In the livestock sector, all countries are emphasizing increased productivity rather than herd size as a means of raising output. The main goals are reduction of calf slaughter, improvement of breeds, and increasing daily weight gains. The principal livestock exporters—Yugoslavia, Hungary, and Poland—are striving to increase the ratio of processed meat exports to live animals. To that end, the meat-processing industry enjoys a high priority in investment allocation.

Hungary has altered its incentive system to encourage the production of beef and the culling of dairy herds. Bonuses are paid for beef calves but not for dairy calves. A new system of dairy premiums went into effect in January which makes it unprofitable to keep cows with annual milk yields below 2,900 liters. The premium will be gradually decreased until 1980, when 3,600 liters will be the break-even yield.

In Poland, where private farming dominates, a pension law was revised in 1974 to allow farmers to hand over a minimum of 2 hectares to the Government, instead of the previous minimum of 5 hectares, in exchange for pensions. Pensions have been increased—they range from 1,200 to 2,500 zloties, depending on land values. These are very gradual means of reducing the number of private farmers.

In Bulgaria, regulations were revised to permit unlimited holdings of private livestock. This represents a basic ideological concession made in the interests of increasing production. (Thomas A. Vankai)

## VOLUME OF U.S. EXPORTS LEVELS OFF

The value of U.S. farm sales to Eastern Europe rose to \$500 million in 1972/73, \$750 million in 1973/74, and are forecast at about \$700 million in the current fiscal year. But in terms of 1971/72 prices, these exports would be valued at from \$350 million to \$400 million in all 3 years.

In volume terms, U.S. shipments of feed grain, cattle hides, and vegetable oil are forecast to increase; wheat exports will decline; and sales of all other major commodities should level off in 1974/75. For the first time since 1970/71, the value of U.S. grain exports will exceed the value of U.S. oilseed product exports to Eastern Europe (table 4).

Poland will again be, by far, the major market (table 5). During July 1974–January 1975, Poland received 40 percent of direct U.S. exports to the region.

This season, the USSR will continue to be the major supplier of wheat to Eastern Europe. The Soviet Union

has contracted to supply 1 million tons of wheat to Poland and 800,000 tons of grain, mostly wheat, to Czechoslovakia in 1975. In addition, the USSR probably will deliver 1 million tons of wheat to East Germany. U.S. exports of wheat to the region, which exceeded 1 million tons in 1973/74, are forecast to decline to less than half that amount in the current year. Poland is the main destination.

U.S. exports of feed grain, however, are forecast to increase from 1.4 million tons last year to about 2 million<sup>5</sup> in 1974/75. Regular customers Poland and East Germany will again head the list, followed by occasional

<sup>5</sup> Outstanding export sales indicate a much higher figure but this figure has been discounted because it is believed that this year an unusually large quantity of outstanding sales will be canceled or deferred.

Table 4--Exports of U.S. agricultural commodities to Eastern Europe, by commodity, 1967/68-1973/74 1/

Commodity	1967/68	1968/69	1969/70	1970/71	1971/72	1972/73	1973/74
<u>Million dollars</u>							
Wheat and flour .....	20.8	.8	.6	52.7	2.5	94.3	145
Feed grains .....	40.9	37.9	33.7	71.6	53.6	93.7	145
Grains .....	61.7	38.7	34.3	124.3	56.1	188.0	<b>290</b>
Oilseeds .....	6.1	7.2	21.6	23.3	9.3	40.6	55
Vegetable oil .....	7.6	1.5	3.9	43.5	28.3	27.8	27.2
Oilmeal .....	22.9	29.0	51.1	51.5	43.1	132.1	243.4
Oilseed products .....	36.6	37.7	76.6	118.3	80.7	200.5	325.6
Cotton .....	17.8	21.3	13.0	4.8	17.4	20.7	46.8
Hides and skins .....	5.9	9.9	13.7	15.9	28.0	69.5	56.3
Other .....	15.2	11.4	13.5	15.2	21.4	18.9	38.2
Total .....	137.2	119.0	151.1	278.5	203.6	497.6	756.9

1/ Adjusted for transshipments through Canada, Netherlands, and West Germany.

Table 5--Exports of U.S. agricultural commodities to Eastern Europe, by country, 1967/68-1973/74 1/

Year	Bulgaria	Czecho-slovakia	East Germany	Hungary	Poland	Romania	Yugoslavia	Total
<u>Million dollars</u>								
1967/68 .....	3.3	10.8	24.2	5.0	52.8	.5	41.2	137.8
1968/69 .....	1.9	8.8	20.4	6.9	55.5	3.6	21.9	119.0
1969/70 .....	4.4	14.0	29.5	12.9	53.3	15.0	22.1	151.2
1970/71 .....	3.6	28.7	17.3	19.2	51.7	51.1	107.0	278.6
1971/72 .....	.7	23.7	24.6	15.5	63.4	27.3	48.6	203.8
1972/73 .....	2.0	55.2	54.8	20.8	202.0	70.5	92.4	497.7
1973/74 .....	2.3	63.4	67.1	30.3	319.0	110.9	163.5	756.9
1974/75 .....								
1975/76 .....								

1/ Adjusted for transshipments through Canada, Netherlands, and West Germany.

buyer Romania. The major portion of the U.S. feed grain exports to Romania is being financed under a \$31 million Commodity Credit Corporation (CCC) credit.

The rapid growth in U.S. oilmeal exports to Eastern Europe—from 240,000 tons in 1967/68 to 970,000 in 1973/74—is forecast to level off this year. Little change in volume is expected but lower prices will reduce the export value sharply. All of the countries of Eastern Europe purchased U.S. meal this year, with Poland, Hungary, and East Germany the leading buyers.

As with wheat, the USSR dominates the East European cotton market. Under bilateral arrangements, North Africa and Middle Eastern countries supply most of the remainder and the U.S. share of the market is small. The volume of U.S. cotton exports should be

about the same as last year but, because of lower prices, the export value will be down. Romania, the leading customer in the region since 1970/71, will again head the list. Virtually all of the U.S. growths are being financed under the CCC credit program—\$20 million has been extended to Romania and \$8 million to Poland to cover 1974/75 cotton purchases.

Sales of U.S. cattle hides to Eastern Europe reached about 3 million pieces in 1972/73 and 1973/74, and are forecast to increase in the current year. As with oilmeal and cotton, lower prices are driving the export value down this year. All countries in the region purchase U.S. cattle hides, with Romania, Poland, and Czechoslovakia continuing as the top customers this year. (Donald Chrisler)

## **APPENDIX TABLES**

Table 6--Eastern Europe: Area of selected crops, annual 1970-74 1/

Commodity and year	Bulgaria	Czecho- slovakia	East Germany	Hungary	Poland	Romania	Yugoslavia	Total Eastern Europe
<u>Million hectares</u>								
Wheat								
1970 .....	1.01	1.08	.60	1.27	1.98	2.32	1.83	10.09
1971 .....	1.03	1.10	.63	1.27	2.06	2.50	1.93	10.52
1972 .....	.96	1.20	.69	1.32	2.05	2.52	1.92	10.66
1973 .....	.93	1.24	.70	1.29	1.96	2.34	1.70	10.16
1974 .....	(.92)	1.28	(.73)	1.32	2.02	(2.40)	1.84	(10.51)
1975 .....								
Rye								
1970 .....	.02	.22	.68	.15	3.41	.04	.11	4.63
1971 .....	.02	.23	.67	.13	3.71	.05	.11	4.92
1972 .....	.02	.23	.65	.12	3.54	.04	.10	4.70
1973 .....	.02	.22	.65	.11	3.42	.05	.10	4.57
1974 .....	(.02)	.22	.63	.11	3.14	(.05)	.10	4.27
1975 .....								
Barley								
1970 .....	.40	.80	.64	.28	.92	.29	.28	3.61
1971 .....	.43	.85	.66	.30	.90	.33	.28	3.75
1972 .....	.45	.85	.62	.29	1.02	.33	.29	3.85
1973 .....	.46	.87	.69	.29	1.08	.32	.33	4.04
1974 .....	(.44)	.87	.78	.27	1.23	(.32)	.33	(4.24)
1975 .....								
Oats								
1970 .....	.71	.38	.21	.04	1.53	.13	.28	3.28
1971 .....	.75	.34	.23	.05	1.33	.13	.26	3.09
1972 .....	.65	.32	.25	.05	1.36	.12	.26	3.01
1973 .....	.70	.28	.24	.04	1.27	.11	.25	2.89
1974 .....	(.70)	.23	.22	.03	1.18	(.11)	.25	(2.72)
1975 .....								
Corn								
1970 .....	.64	.13	.01	1.19	.01	3.08	2.35	7.41
1971 .....	.66	.14	2/	1.32	.01	3.13	2.42	7.68
1972 .....	.69	.15	.01	1.39	2/	3.20	2.38	7.82
1973 .....	.62	.17	2/	1.46	2/	2.96	2.38	7.59
1974 .....	(.58)	.17	.01	1.46	2/	(3.00)	2.25	(7.47)
1975 .....								
Total grain 3/								
1970 .....	2.16	2.61	2.29	2.96	8.34	5.90	4.88	29.14
1971 .....	2.22	2.67	2.32	3.09	8.45	6.17	5.03	29.95
1972 .....	2.19	2.75	2.33	3.20	8.49	6.24	4.98	30.18
1973 .....	2.19	2.78	2.38	3.21	8.25	5.79	4.77	29.37
1974 .....	(2.12)	2.76	2.44	3.19	8.11	(5.88)	4.77	(29.27)
1975 .....								
Potatoes								
1970 .....	.03	.34	.67	.14	2.73	.29	.33	4.53
1971 .....	.03	.33	.66	.13	2.67	.29	.33	4.44
1972 .....	.03	.32	.65	.12	2.66	.30	.32	4.40
1973 .....	.03	.30	.65	.11	2.68	.28	.32	4.37
1974 .....	(.03)	.28	.64	.11	2.60	(.30)	(.32)	(4.28)
1975 .....								
Sugarbeets								
1970 .....	.06	.18	.19	.08	.41	.17	.08	1.17
1971 .....	.04	.19	.21	.07	.42	.18	.08	1.19
1972 .....	.06	.19	.22	.08	.44	.20	.08	1.27
1973 .....	.06	.20	.23	.09	.45	.23	.09	1.35
1974 .....	(.06)	.21	.23	.10	(.44)	.22	.10	(1.36)
1975 .....								
Oilseeds 4/								
1970 .....	.28	.04	.10	.09	.30	.60	.19	1.60
1971 .....	.27	.05	.10	.12	.36	.55	.18	1.63
1972 .....	.27	.05	.11	.11	.28	.55	.17	1.54
1973 .....	.25	.06	.12	.10	.32	.51	.22	1.58
1974 .....	(.29)	.05	.12	.10	.26	(.60)	.20	(1.62)
1975 .....								

1/ 1974 data are preliminary or USDA estimates. USDA estimates are in parentheses.

2/ Less than 5,000 hectares.

3/ Includes buckwheat, millet, spelt, mixed grains, and rice.

4/ Sunflowerseed only for Bulgaria, Hungary, Romania, and Yugoslavia. Rapeseed only for Czechoslovakia, East Germany, and Poland.

Table 7--Eastern Europe: Production of selected crops, annual 1970-74 1/

Commodity and year	Bulgaria	Czecho- slovakia	East Germany	Hungary	Poland	Romania	Yugoslavia	Total Eastern Europe
<u>Million tons</u>								
<b>Wheat</b>								
1970 .....	3.03	3.17	2.13	2.72	4.61	3.40	3.79	22.85
1971 .....	3.09	3.88	2.49	3.92	5.46	5.66	5.60	30.10
1972 .....	3.58	4.02	2.74	4.10	5.15	6.04	4.84	30.47
1973 .....	3.26	4.65	2.86	4.50	5.81	5.47	4.75	31.30
1974 .....	(2.80)	(5.13)	(3.20)	4.96	6.41	4.95	6.28	(33.73)
1975 .....								
<b>Rye</b>								
1970 .....	.03	.62	1.48	.16	5.43	.06	.13	7.91
1971 .....	.02	.63	1.75	.18	7.83	.07	.13	10.61
1972 .....	.02	.69	1.90	.17	8.15	.06	.12	11.11
1973 .....	.02	.62	1.70	.18	8.27	.06	.12	10.97
1974 .....	.02	.68	1.93	.18	7.87	.06	.12	(10.86)
1975 .....								
<b>Barley</b>								
1970 .....	1.17	2.28	1.93	.55	2.15	.51	.40	8.99
1971 .....	1.25	2.85	2.29	.78	2.45	.79	.46	10.87
1972 .....	1.43	2.65	2.59	.80	2.75	.84	.49	11.55
1973 .....	1.37	2.96	2.85	.87	3.16	.73	.68	12.62
1974 .....	1.40	3.40	3.42	.89	3.91	.91	.79	(14.72)
1975 .....								
<b>Oats</b>								
1970 .....	.10	.78	.56	.06	3.21	.12	.31	5.14
1971 .....	.10	.90	.81	.09	3.20	.16	.31	5.57
1972 .....	.08	.73	.89	.06	3.21	.11	.26	5.34
1973 .....	.05	.74	.81	.07	3.22	.10	.30	5.29
1974 .....	.10	.69	.92	.06	3.25	.09	.35	(5.46)
1975 .....								
<b>Corn</b>								
1970 .....	2.38	.51	.01	4.01	.01	6.54	6.93	20.39
1971 .....	2.52	.52	.01	4.67	.01	7.85	7.44	23.02
1972 .....	2.97	.64	.03	5.54	.01	9.82	7.93	26.94
1973 .....	2.57	.62	.01	5.91	.01	7.40	8.25	24.77
1974 .....	2.00	.74	.03	6.20	.01	7.16	7.99	24.13
1975 .....								
<b>Total grain 2/</b>								
1970 .....	6.77	8.20	6.46	7.61	16.26	10.63	11.61	67.54
1971 .....	7.06	8.77	7.74	9.78	19.87	14.53	14.01	81.76
1972 .....	8.17	8.67	8.54	10.75	20.40	16.91	13.68	87.12
1973 .....	7.34	9.66	8.50	11.66	21.86	13.81	14.14	86.97
1974 .....	6.40	10.63	9.70	12.30	22.98	13.24	15.55	90.80
1975 .....								
<b>Potatoes</b>								
1970 .....	.37	4.79	13.05	1.43	50.30	2.06	2.96	74.96
1971 .....	.40	4.62	9.41	1.49	39.80	3.78	2.95	62.45
1972 .....	.38	5.06	12.14	1.31	48.74	3.67	2.41	73.71
1973 .....	.33	5.09	11.40	1.16	51.93	2.64	2.97	73.52
1974 .....	.31	4.59	13.40	1.36	48.64	3.90	2.91	75.11
1975 .....								
<b>Sugarbeets</b>								
1970 .....	1.71	6.64	6.13	2.18	12.74	2.92	2.95	35.27
1971 .....	1.52	5.83	5.13	2.02	12.56	3.98	2.96	34.00
1972 .....	1.95	6.88	7.22	2.91	14.34	5.58	3.27	42.15
1973 .....	1.72	6.16	6.68	2.75	13.66	4.38	3.34	38.69
1974 .....	(1.50)	8.20	6.96	3.44	12.96	5.00	4.24	(42.30)
1975 .....								
<b>Oilseeds 3/</b>								
1970 .....	.41	.06	.18	.09	.57	.77	.26	2.34
1971 .....	.46	.10	.20	.14	.60	.79	.35	2.64
1972 .....	.49	.11	.23	.13	.43	.85	.28	2.52
1973 .....	.45	.12	.25	.15	.51	.76	.43	2.67
1974 .....	.40	(.08)	.30	.10	.52	.67	.30	2.37
1975 .....								

1/ 1974 data are preliminary or USDA estimates. USDA estimates are in parentheses.

2/ Includes buckwheat, millet, spelt, mixed grains, and rice.

3/ Sunflowerseed only for Bulgaria, Hungary, Romania, and Yugoslavia. Rapeseed only for Czechoslovakia, East Germany, and Poland.

Table 8--Eastern Europe: Livestock numbers, 1970-75 1/

Category and year	(January of each year)								Total Eastern Europe	
	Bulgaria	Czecho- slovakia	East Germany	Hungary	Poland	Romania	Yugoslavia 2/			
<u>Million head</u>										
<b>Cattle, total</b>										
1970 .....	1.26	4.22	5.17	1.93	10.28	5.03	5.03		32.92	
1971 .....	1.28	4.29	5.19	1.91	10.22	5.22	5.14		33.25	
1972 .....	1.38	4.35	5.29	1.88	10.56	5.53	5.15		34.14	
1973 .....	1.44	4.47	5.38	1.89	11.26	5.77	5.37		35.58	
1974 .....	(1.45)	4.56	5.48	1.93	12.31	5.90	5.68		37.31	
1975 .....	(1.50)	4.57	5.59	2.02	12.82	(6.00)	(6.00)		(38.50)	
1976 .....										
<b>Cows</b>										
1970 .....	.57	1.88	2.17	.74	6.04	2.23	2.79		16.42	
1971 .....	.59	1.88	2.16	.76	5.83	2.28	2.77		16.27	
1972 .....	.61	1.90	2.17	.75	5.90	2.38	2.79		16.50	
1973 .....	.62	1.91	2.17	.76	6.02	2.45	2.92		16.85	
1974 .....	(.61)	1.93	2.16	.79	6.27	2.50	3.06		17.32	
1975 .....	(.62)	1.93	2.16	.84	6.35	(2.50)	3.20		(17.60)	
1976 .....										
<b>Hogs</b>										
1970 .....	1.97	5.04	9.24	5.70	14.76	5.97	5.54		48.22	
1971 .....	2.37	5.53	9.68	7.31	13.86	6.36	6.56		51.67	
1972 .....	2.81	5.94	10.00	7.59	16.95	7.74	6.22		57.25	
1973 .....	2.60	6.09	10.36	6.86	19.03	8.78	6.34		60.06	
1974 .....	2.43	6.27	10.85	8.01	21.45	8.98	7.40		65.39	
1975 .....	(2.50)	6.72	11.52	8.29	21.71	(9.10)	(7.70)		(67.54)	
1976 .....										
<b>Sheep</b>										
1970 .....	9.22	.98	1.70	2.25	2.63	13.84	8.97		39.59	
1971 .....	9.68	.98	1.60	2.32	2.66	13.82	8.70		39.76	
1972 .....	10.13	.93	1.61	2.05	2.65	14.07	8.33		39.77	
1973 .....	9.92	.89	1.66	1.94	2.63	14.46	7.77		39.27	
1974 .....	9.76	.84	1.74	1.88	2.60	14.32	7.85		38.99	
1975 .....	(9.80)	(.81)	1.85	2.00	2.66	(14.00)	(8.10)		(39.22)	
1976 .....										
<b>Horses</b>										
1970 .....	.18	.14	.15	.24	2.62	.69	1.08		5.10	
1971 .....	.17	.13	.13	.22	2.57	.67	1.05		4.94	
1972 .....	.16	.12	.11	.21	2.50	.65	1.02		4.77	
1973 .....	.15	.10	.09	.19	2.40	.63	.96		4.52	
1974 .....	.14	.08	.08	.17	2.39	(.61)	.95		4.42	
1975 .....	(.13)	(.08)	.07	(.18)	2.33	(.60)	(.92)		(4.31)	
1976 .....										
<b>Poultry</b>										
1970 .....	29.59	34.87	42.56	56.70	85.50	53.89	40.85		343.96	
1971 .....	33.71	39.19	43.03	61.30	87.56	54.33	44.95		364.07	
1972 .....	34.10	38.24	43.34	58.80	88.85	61.26	44.58		369.17	
1973 .....	34.79	39.17	43.66	50.60	92.88	64.50	49.21		374.81	
1974 .....	36.90	41.23	45.67	54.00	94.23	(66.00)	54.68		392.71	
1975 .....	(34.00)	(42.00)	39.48	47.70	(96.00)	(70.00)	(58.00)		(387.18)	
1976 .....										

1/ 1975 data are preliminary or USDA estimates. USDA estimates are in parentheses.

2/ Sheep numbers include goats.

Table 9--Eastern Europe: Production of principal livestock products, annual 1969-74 1/

Commodity and year	Bulgaria	Czecho- slovakia	East Germany	Hungary	Poland	Romania	Yugoslavia	Total Eastern Europe
<u>Million tons</u>								
<u>Beef and veal 2/</u>								
1969 .....	.11	.36	.33	.22	.68	.24	.28	2.22
1970 .....	.11	.36	.34	.20	.66	.22	.24	2.13
1971 .....	.10	.37	.33	.20	.64	.21	.26	2.11
1972 .....	.11	.38	.35	.19	.59	.22	.27	2.11
1973 .....	.13	.40	.37	.21	.63	.25	.29	2.28
1974 .....	(.13)	.43	.39	(.19)	.81	(.25)	(.30)	(2.50)
1975 .....								
<u>Mutton, lamb, and goat meat 2/</u>								
1969 .....	.10	3/	.01	.02	.03	.06	.05	.27
1970 .....	.09	3/	.01	.02	.03	.06	.05	.26
1971 .....	.10	3/	.01	.02	.03	.07	.05	.28
1972 .....	.10	3/	.01	.02	.03	.06	.05	.27
1973 .....	.10	3/	.01	.02	.03	.07	.05	.28
1974 .....	(.10)	3/	(.01)	(.02)	(.03)	(.07)	(.05)	(.28)
1975 .....								
<u>Pork 2/</u>								
1969 .....	.20	.56	.85	.56	1.35	.42	.46	4.40
1970 .....	.18	.59	.82	.59	1.32	.45	.54	4.19
1971 .....	.20	.62	.85	.75	1.36	.47	.61	4.86
1972 .....	.24	.68	.93	.85	1.64	.59	.56	5.49
1973 .....	.22	.67	.97	.74	1.83	.67	.50	5.60
1974 .....	(.23)	.75	1.04	(.90)	1.95	(.71)	(.55)	(6.13)
1975 .....								
<u>Poultry meat 2/</u>								
1969 .....	.08	.08	.08	.19	.13	.12	.12	.80
1970 .....	.09	.10	.08	.22	.14	.12	.14	.89
1971 .....	.11	.11	.10	.24	.15	.14	.15	1.00
1972 .....	.11	.12	.11	.23	.17	.19	.14	1.07
1973 .....	.11	.12	.11	.26	.20	.21	.16	1.17
1974 .....	(.12)	.13	(.12)	.27	(.20)	(.23)	(.16)	(1.23)
1975 .....								
<u>Total meat 2/4/</u>								
1969 .....	.49	1.05	1.29	1.00	2.23	.83	.99	7.88
1970 .....	.48	1.10	1.27	1.04	2.20	.86	1.06	8.01
1971 .....	.52	1.16	1.33	1.22	2.23	.90	1.16	8.52
1972 .....	.56	1.23	1.42	1.29	2.48	1.06	1.11	9.15
1973 .....	.56	1.24	1.49	1.24	2.73	1.20	1.07	9.53
1974 .....	(.58)	1.35	(1.59)	1.38	3.07	(1.26)	(1.12)	(10.35)
1975 .....								
<u>Milk 2/</u>								
1969 .....	1.58	4.75	7.23	1.89	14.76	3.10	2.81	36.12
1970 .....	1.63	4.79	7.09	1.86	14.95	3.12	2.74	36.18
1971 .....	1.67	4.92	7.15	1.80	15.15	3.20	2.73	36.62
1972 .....	1.67	5.12	7.52	1.81	15.76	3.56	2.97	38.41
1973 .....	1.71	5.43	7.74	1.96	16.24	3.78	3.16	40.02
1974 .....	(1.72)	5.50	8.08	2.06	16.78	(3.70)	(3.20)	(41.04)
1975 .....								
<u>Millions</u>								
<u>Eggs</u>								
1969 .....	1,519	3,430	4,194	2,714	6,700	3,315	2,476	24,348
1970 .....	1,618	3,733	4,442	3,280	6,941	3,537	2,781	26,332
1971 .....	1,747	3,996	4,504	3,475	7,080	3,984	2,937	27,723
1972 .....	1,723	4,120	4,425	3,217	7,475	4,300	2,964	28,224
1973 .....	(1,761)	4,254	4,554	3,285	7,437	4,655	3,110	29,056
1974 .....	(1,790)	4,468	(4,800)	3,400	7,865	(4,800)	(3,180)	(30,303)
1975 .....								

<sup>1/</sup> 1974 data are preliminary or USDA estimates. USDA estimates are in parentheses.<sup>2/</sup> CEMA data except Yugoslavia which is not a CEMA member.<sup>3/</sup> Less than 5,000 tons.<sup>4/</sup> Includes horse and rabbit meat.<sup>2/</sup> Cows milk only for Czechoslovakia, East Germany, Hungary, and Poland. In East Germany, milk production is given in 3.5 percent fat content equivalent.

Table 10--Eastern Europe: Trade in selected

Commodity and country	Imports						
	1968	1969	1970	1971	1972	1973	1974 2/
<u>1,000 tons</u>							
<b>Total grain</b>							
Bulgaria	365	508	158	195	0	136	
Czechoslovakia	1,879	1,727	1,367	2,033	1,550	1,552	
East Germany	1,628	1,864	3,424	3,066	3,845	2,990	
Hungary	455	356	181	808	788	265	
Poland	1,972	1,875	2,484	2,904	3,108	3,263	
Romania 4/	NA	NA	NA	NA	NA	NA	
Yugoslavia	79	52	125	1,006	982	278	
Total	NA	NA	NA	NA	NA	NA	
<b>Wheat</b>							
Bulgaria	273	401	52	150	0	0	
Czechoslovakia	1,371	1,226	1,026	1,204	1,094	950	
East Germany	1,075	1,311	2,084	1,867	2,040	1,594	
Hungary	307	301	156	401	35	0	
Poland	1,068	1,181	1,099	1,910	1,274	1,620	1,756
Romania 4/	NA	NA	NA	NA	NA	NA	
Yugoslavia	79	0	5/	547	448	225	
Total	NA	NA	NA	NA	NA	NA	
<b>Barley</b>							
Bulgaria	54	22	106	8	0	53	
Czechoslovakia	125	197	139	133	112	133	
East Germany	170	218	799	187	675	298	
Hungary	74	45	23	209	248	199	
Poland	545	375	1,093	616	1,332	780	
Romania 4/	NA	NA	NA	NA	NA	NA	
Yugoslavia	0	34	115	125	66	10	
Total	NA	NA	NA	NA	NA	NA	
<b>Corn</b>							
Bulgaria	39	83	0	33	0	68	
Czechoslovakia	263	217	122	480	302	469	
East Germany	378	289	376	656	1,031	1,086	
Hungary	74	0	0	162	107	0	
Poland	295	247	231	267	337	684	
Romania 4/	NA	NA	NA	NA	NA	NA	
Yugoslavia	0	7	1	308	417	42	
Total	NA	NA	NA	NA	NA	NA	
<b>Oilseeds</b>							
Bulgaria	31	41	21	6	5	2	
Czechoslovakia	209	181	188	132	120	140	
East Germany	132	130	203	208	197	133	
Hungary	23	75	38	64	6	5	
Poland	52	132	82	88	108	163	
Romania	NA	NA	NA	NA	NA	NA	
Yugoslavia	31	15	4	51	9	12	
Total	NA	NA	NA	NA	NA	NA	

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Exports										Commodity and country					
1968	:	1969	:	1970	:	1971	:	1972	:	1973	:	1974 2/	:	1975	:
<u>1,000 tons</u>															
489		536		462		558		833		367					: Total grain
27		54		62		35		35		33					: Bulgaria
NA		NA		NA		NA		NA		NA					: Czechoslovakia
141		460		810		112		505		1,732					: East Germany 3/
119		183		200		111		208		410					: Hungary
1,555		1,368		371		702		900		1,126					: Poland
433		316		293		49		22		258					: Romania
NA		NA		NA		NA		NA		NA					: Yugoslavia
															Total
															: Wheat
365		238		211		324		509		220					: Bulgaria
0		14		0		0		0		0					: Czechoslovakia
NA		NA		NA		NA		NA		NA					: East Germany 3/
115		367		571		83		363		923					: Hungary
0		0		0		0		0		0					: Poland
1,176		480		14		236		543		776					: Romania
3		0		4		2		0		0					: Yugoslavia
NA		NA		NA		NA		NA		NA					Total
															: Barley
0		0		0		0		40		16					: Bulgaria
27		40		54		33		35		33					: Czechoslovakia
NA		NA		NA		NA		NA		NA					: East Germany 3/
NA		NA		NA		NA		NA		NA					: Hungary
32		51		144		78		129		43					: Poland
0		0		0		0		0		0					: Romania
21		1		5/		1		0		103					: Yugoslavia
NA		NA		NA		NA		NA		NA					Total
															: Corn
124		298		250		230		285		130					: Bulgaria
5/		0		0		0		0		0					: Czechoslovakia
NA		NA		NA		NA		NA		NA					: East Germany 3/
5/		79		180		26		19		693					: Hungary
0		0		0		0		0		0					: Poland
375		888		357		466		357		350					: Romania
389		311		287		42		19		258		263			: Yugoslavia
NA		NA		NA		NA		NA		NA					Total
															: Oilseeds
50		134		117		95		95		35					: Bulgaria
2		4		3		3		2		3					: Czechoslovakia
NA		NA		NA		NA		NA		NA					: East Germany
18		36		42		80		36		27					: Hungary
175		85		46		61		10		57					: Poland
NA		NA		NA		NA		NA		NA					: Romania
16		17		129		28		15		6					: Yugoslavia
NA		NA		NA		NA		NA		NA					Total

--Continued

Table 10--Eastern Europe: Trade in selected

Commodity and country	Imports						
	1968	1969	1970	1971	1972	1973	1974 2/
<u>1,000 tons</u>							
<b>Vegetable oil, edible</b>							
Bulgaria	25	19	5	1	0	5/	
Czechoslovakia	47	50	50	55	58	40	
East Germany	112	104	117	99	161	98	
Hungary	29	28	12	30	7	21	
Poland	47	41	42	65	69	66	
Romania	5	8	7	1	1	1	
Yugoslavia	47	10	36	134	128	48	
Total	312	260	269	385	423	274	
<b>Oilseed meal 6/</b>							
Bulgaria	53	81	91	137	179	170	
Czechoslovakia	342	455	428	365	501	630	
East Germany	379	456	522	637	834	769	
Hungary	270	260	341	401	377	380	
Poland	299	278	313	317	545	721	
Romania	NA	NA	NA	NA	NA	NA	
Yugoslavia	122	139	196	188	150	200	273
Total	NA	NA	NA	NA	NA	NA	
<b>Cotton</b>							
Bulgaria	58	62	61	62	56	61	
Czechoslovakia	107	82	114	106	108	104	
East Germany	87	79	106	91	91	86	
Hungary	75	64	98	66	67	73	74
Poland	156	132	150	143	157	145	150
Romania	76	84	83	91	97	108	
Yugoslavia	72	111	70	79	86	94	109
Total	631	614	576	638	662	671	
<b>Hides, cattle 7/</b>							
Bulgaria	690	570	465	486	384	366	
Czechoslovakia	2,050	1,800	2,141	2,443	2,451	2,452	
East Germany	945	693	1,008	1,008	1,071	1,449	
Hungary	1,653	1,200	1,635	1,063	1,476	1,716	
Poland 8/	2,595	2,211	2,645	2,834	3,338	3,842	
Romania	1,153	1,470	2,663	1,675	2,335	3,244	
Yugoslavia	1,386	1,260	2,268	1,260	1,449	1,449	
Total	10,472	9,204	11,190	10,769	12,504	14,518	
<b>Meat and meat products 9/</b>							
Bulgaria	14	11	16	15	10	15	
Czechoslovakia	83	110	121	76	46	11	
East Germany	68	66	85	56	47	43	
Hungary	24	27	61	16	14	27	
Poland	79	36	44	153	65	55	
Romania	NA	NA	8	46	43	8	
Yugoslavia	6	2	13	4	6	35	
Total	NA	NA	348	366	231	194	

Exports							Commodity and country								
1968	:	1969	:	1970	:	1971	:	1972	:	1973	:	1974 2/	:	1975	:
<u>1,000 tons</u>															
:															
46		60		47		20		26		19					: Vegetable oil,
6		3		0		8		1		1					: edible
0		0		0		0		0		0					: Bulgaria
42		56		30		44		41		41					: Czechoslovakia
55		35		38		17		62		47					: East Germany
116		144		119		132		129		142					: Hungary
NA		NA		NA		NA		NA		NA					: Poland
NA		NA		NA		NA		NA		NA					: Romania
															: Yugoslavia
															: Total
															:
NA		NA		7		36		40		42					: Oilseed meal 6/
NA		NA		13		14		29		27					: Bulgaria
0		0		0		0		0		0					: Czechoslovakia
NA		NA		41		98		60		116					: East Germany
0		0		16		30		14		0					: Hungary
NA		NA		NA		NA		NA		NA					: Poland
13		31		52		8		9		5/					: Romania
NÁ		NA		NA		NA		NA		NA					: Yugoslavia
															: Total
															:
															: Cotton
16		11		12		9		10		6					: Bulgaria
4		0		0		16		0		0					: Czechoslovakia
0		0		0		0		0		0					: East Germany
0		0		0		0		0		0					: Hungary
0		0		0		0		0		0					: Poland
0		0		0		0		0		0					: Romania
0		0		0		0		0		0					: Yugoslavia
20		11		12		25		10		6					: Total
															:
NA		NA		44		137		2		0					: Hides, cattle 7/
0		0		0		0		0		0					: Bulgaria
0		0		0		0		0		0					: Czechoslovakia
0		0		0		0		0		0					: East Germany
126		126		189		189		189		126					: Hungary
0		0		0		0		0		0					: Poland 8/
0		0		0		0		0		0					: Romania
NA		NA		233		326		191		126					: Yugoslavia
															: Total
															:
															: Meat and meat products 9/
84		74		65		67		74		65					: Bulgaria
31		37		19		30		25		50					: Czechoslovakia
NA		NA		NA		NA		NA		NA					: East Germany
120		107		123		162		163		134					: Hungary
176		176		157		174		173		194					: Poland
92		80		55		55		69		111					: Romania
118		112		99		102		108		91		55			: Yugoslavia
NA		NA		NA		NA		NA		NA					: Total

--Continued

Table 10--Eastern Europe: Trade in selected

Commodity and country	Imports							1,000 tons
	1968	1969	1970	1971	1972	1973	1974 2/	
	NA	NA	NA	NA	NA	NA	NA	
<b>Sugar, refined</b>								
Bulgaria	NA	NA	NA	NA	NA	NA	NA	
Czechoslovakia	NA	NA	NA	NA	NA	NA	NA	
East Germany	NA	NA	NA	NA	NA	NA	NA	
Hungary	17	19	34	182	134	160		
Poland	19	41	12	40	34	3		
Romania	55	65	90	119	NA	NA		
Yugoslavia	68	34	10	90	271	376	112	
Total	NA	NA	NA	NA	NA	NA	NA	
Tobacco								
Bulgaria	2	1	5	6	12	5		
Czechoslovakia	22	19	16	17	21	18		
East Germany	21	17	16	19	23	18		
Hungary	12	10	8	8	9	9		
Poland	5	4	3	3	3	7		
Romania	NA	NA	2	5	2	2		
Yugoslavia	16	14	19	20	17	18		
Total	NA	NA	69	78	87	77		

NA = Not available.

1/ Data from Statisticheskiy Ezhegodnik Stran-Chlenov Soveta Ekonomicheskoy Vzaimopomoshchi (CEMA), except for Yugoslavia which is not a CEMA member.

2/ 1974 data are preliminary.

3/ CEMA does not report any grain exports for East Germany. For fiscal year grain exports, see text table 1.

4/ CEMA does not report any grain imports for Romania. For fiscal year grain imports, see text table 1.

5/ Less than 500 tons.

6/ Includes millfeed.

7/ Thousand pieces.

8/ Converted from metric tons to pieces at 35 kilograms per piece.

9/ Includes poultry meat.



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